



AND



PROUDLY PRESENT:

'ADVANCED' TAX RETURN ANALYSIS FACILITATED BY DAVID OSBURN

DENVER
WEDNESDAY, APRIL 4, 2012
9:00 a.m. to 4:00 p.m.
Sterner Training Center, 1009 Grant Street

This seminar will provide you with an overview of several **advanced tax return concepts and related analysis**. The day will begin with a brief review of preparing a **business owner's** 1040 tax return, followed by a cash flow analysis case study. The remainder of the training will cover pertinent tax topics related to **business clients** as follows:

- ◆ Corporate taxes including Section 179 depreciation and other deductions
- ◆ Employer provided benefits including "qualified retirement plans"
- ◆ Real estate lending including rentals and home offices
- ◆ Investments including capital gains issues and passive activities
- ◆ Estate planning including gift taxes
- ◆ Retirement planning including "defined benefit" plans
- ◆ Recent **changes** to the tax code that impact business owners

Each of the seminar topics will be presented from the perspective of more **effectively** working with the bank's business clients.

WHO SHOULD ATTEND? This program is designed for all bank employees who work with business owners.

DAVID OSBURN is the founder and managing member of David L. Osburn & Associates LLC, a Las Vegas-based business training and contract CFO firm that provides seminar/keynote speeches for various groups including CPAs, bankers, attorneys, credit union employees, credit managers, trade groups, and business owners. David's extensive professional background encompasses over 24 years in banking, finance, and marketing. His bank commercial lending credentials include comprehensive loan underwriting, management, customer development, and loan work-out experience.

\$285.00* Member Early / \$310.00* Member Regular
REGISTER ONE PERSON AT THE ADVERTISED TUITION PRICE (EARLY OR REGULAR),
RECEIVE A 10% DISCOUNT ON ANY ADDITIONAL REGISTRANTS FOR THIS CLASS!

REGISTRATION FORM (Course #N5645A1S12-CBA)

FAX: 303-629-1591 ◆ ONLINE: www.CFTWS.org ◆ MAIL: CFTWS, 1009 Grant Street, Suite 102, Denver, CO 80203

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***REGISTRATION GUIDELINE:**
REGISTER by **MARCH 21, 2012** to receive the "Early" Tuition Rate. NO REFUNDS WILL BE GIVEN AFTER MARCH 21st, ALTHOUGH A SUBSTITUTE MAY ATTEND. Cancellations received in writing prior to March 21st will be subject to a \$75 withdrawal fee. (Non-member \$570/\$595)